doxim®

Streamlining Tax Form Processing

with Doxim Year-End Tax

www.doxim.com Info@doxim.com 866 475 9876

Streamlining Tax Form Processing With Doxim Year-End Tax

Key Points

- Easy and quick to transition to the Doxim Year-End Tax process
- Fully transparent day-to-day process using our online production board and help desk
- Customized service offering focused on efficiency an postage savings
- Secure mailing services with full audit and tracking capability
- Electronic tax document access using Doxim ECM

The annual process of tax form production and distribution is time consuming, stressful, and expensive. Financial service providers need to find ways to improve and streamline the production of year-end tax forms for their customers, automating the process as much as possible.

The Solution - Doxim Year-End Tax

Doxim Year-End Tax is a tax form processing and distribution service that takes the headache out of year-end tax form process. It allows you to deliver a more secure, higher quality tax package to your customers, while saving on postage too.

Doxim Year-End Tax is a fully automated solution that manages all aspects of the tax form processing, from receipt of initial files, right through to insertion into the postal system and/or upload to an online document repository.

Key Client Drivers

Doxim Year-End Tax is specifically designed to help financial service providers address several key tax form processing issues:

1. Creation and Provision of Annual Instructions

With a manual tax form management process, the provision of client instructions can be both laborious and repetitive.

Doxim's Year End Portal allows you to can be both laborious and repetitive. Doxim's yearend portal allows you to upload all information needed for year-end processing, such as print and mail instructions, new logos, cover letter text, and French lists to name a few. These instructions are archived from year-to-year, making subsequent year-end instruction preparation quick and easy.

2. Data Validation

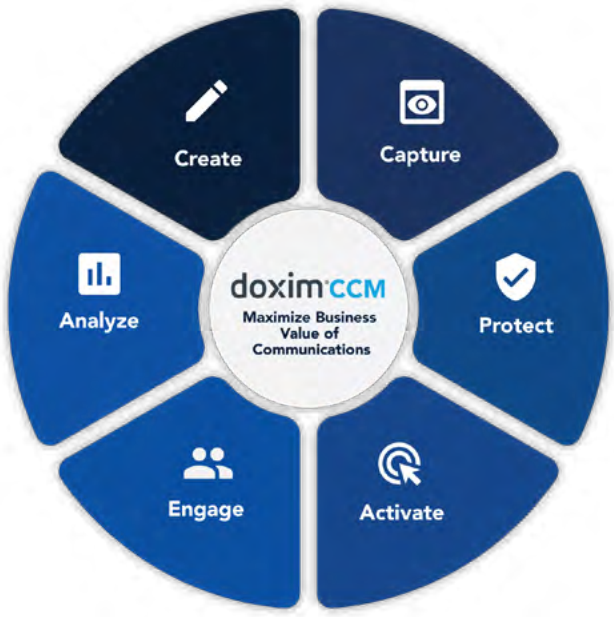
As with all financial documents, accuracy of the data included in tax forms is paramount. Doxim provides an online validation site where you can search and validate data and forms prior to production. With manual systems this process can take days to complete; with Doxim Year-End Tax it can be completed in minutes. This creates a better production flow, enabling improved print, mail, and eDelivery completion times. Doxim Year-End Tax supports two validation steps:

a. Data Validation – Allowing you to validate the "raw" data received by Doxim from the data provider.

b. Pre-Print Validation – Allowing you to validate the merged tax form packages - essentially the exact package their end client will receive, prior to production.

3. Mailing Costs

Items like the CRA 'T5' mailing for investors can have multiple associated forms such as the T5008 and RL3 plus generated reports such as a Transaction Summary and / or Income Summary. This can lead to significant mailing costs for multiple clients.
The Doxim Year-End Tax process groups or 'merges' all these documents into one envelope providing significant postage savings.



Doxim CCM Platform

The Doxim CCM platform is an integrated SaaS solution that empowers clients to create and deliver business-critical documents and omnichannel personalized communications, engaging customers throughout the entire lifecycle.

From acquisition to ongoing service, cross-sell, and retention, Doxim CCM enables organizations in financial services, utilities, healthcare, and other regulated industries to leverage their data to communicate with customers via their preferred channel, while supporting the industry-specific regulatory requirements.

The Doxim CCM SaaS platform deployment is seamless and cost-effective, backed by our purpose-built technologies, core systems integrations, APIs, enterprise-grade infrastructure and security policies, and the experienced and dedicated client services teams. Unlike other CCM solutions, the Doxim platform is designed to be a full suite of CCM services.

Discover The Benefits Of A CCM Platform

Improve Customer Experience

It's not easy to satisfy the demands of modern consumers who have high expectations and many choices. Create better-looking statements, print in full color, deliver via a channel of choice, get analytics on engagement – all with Doxim as your one-stop trusted partner.

Unlock Additional Revenue

Transactional communications such as statements, bills, notices, reports, are like regular meetings your customers simply have to attend! Use every chance to put a personalized offer in front of every customer, creating value for them and driving more revenue from cross selling for your organization.

Remove Operational Complexity

Let Doxim handle your omnichannel document design, production, storage, and delivery so you can focus on your core business. With our scale and expertise, we will handle all operational complexity – ensuring quality and consistency across all channels and reducing your team's workload.

Ensure Compliance

Don't leave privacy, security, and compliance to chance. Doxim operates state-of-the-art, fully compliant production facilities and data centers across North America, and has processes in place to control risks associated with business critical document production, storage, and delivery

Discover Many Ways to Save Costs

From cutting costs of paper and postage, to consolidating multiple documents into one package or leveraging the economies of scale only a vendor with a national presence can offer, Doxim delivers tangible savings.

Security Cover Sheet with Logo

All merged tax form mailings have a custom printed cover sheet that lists the documents enclosed, with a properly formatted address box, positioned for your company's standard #10 envelope. This ensures that sensitive data is kept away from prying eyes. It can also incorporate your company logo and a custom message text.

Automatic Pulls

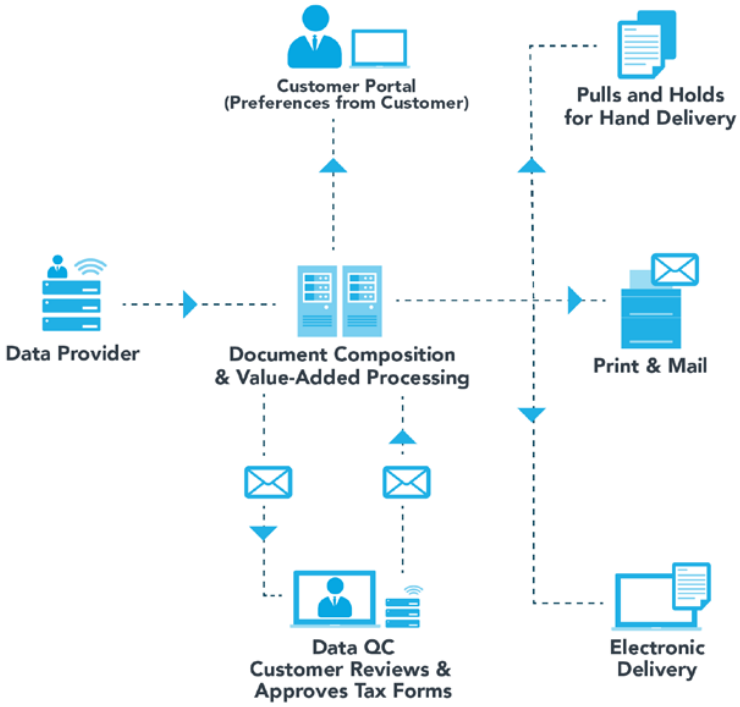
Automated pulls or routing help eliminate timeconsuming manual work. Doxim can accommodate pulls in a number of ways:
1. You supply a list of accounts at the beginning of year-end, and this list will be pulled from all year-end Tax Forms.
2. You supply a list of accounts to be pulled for specific tax form types (e.g. T5, T3 etc.).

You can pull a specific slip (not necessarily all slips for that account) during the validation process, directly on the year-end portal.

French Language Split

A French language split allows firms to apply French cover letters and use French envelopes for their clients, in place of English.

Doxim Year-End Processing



Output Validated by OMR and Security Sequence Number

All tax forms processed through Doxim Year-End Tax are subject to OMR, security sequence numbering, and dual camera validation to ensure the highest integrity for your sensitive information.

Electronic Archiving

Doxim Enterprise Content Manager (ECM) enables your staff and clients to access tax forms online, streamlining the reprint process. Doxim ECM also positions you to Doxim Year-End Tax is the ideal solution to streamline all your year-end tax form processing and distribution activities. It's easy-to-use, highly secure, and wraps integrity, flexibility, and value around the tax form process, while offering the opportunity for significant savings too.

Let's Talk
Contact Doxim the team to discuss streamlining your tax form creation and distribution processes.

doxim®

Doxim is the customer communications and engagement technology leader serving financial and regulated markets, providing omnichannel document solutions and transforming experiences to strengthen engagement throughout the entire lifecycle. Learn more at www.doxim.com.

www.doxim.com Info@doxim.com 866 475 9876